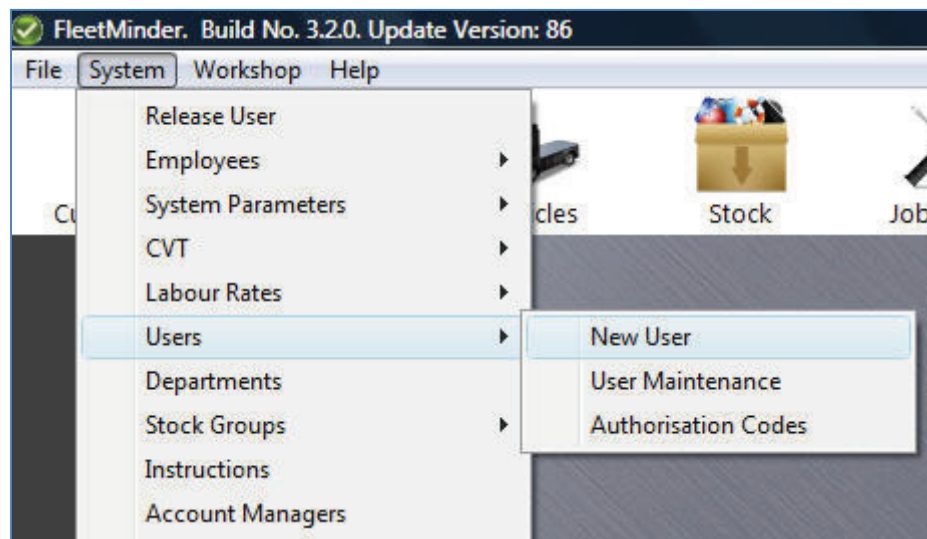


Chapter 2

Basics

Add a New User



New User

Click **System**.

Click **Users**.

Click **New User**.

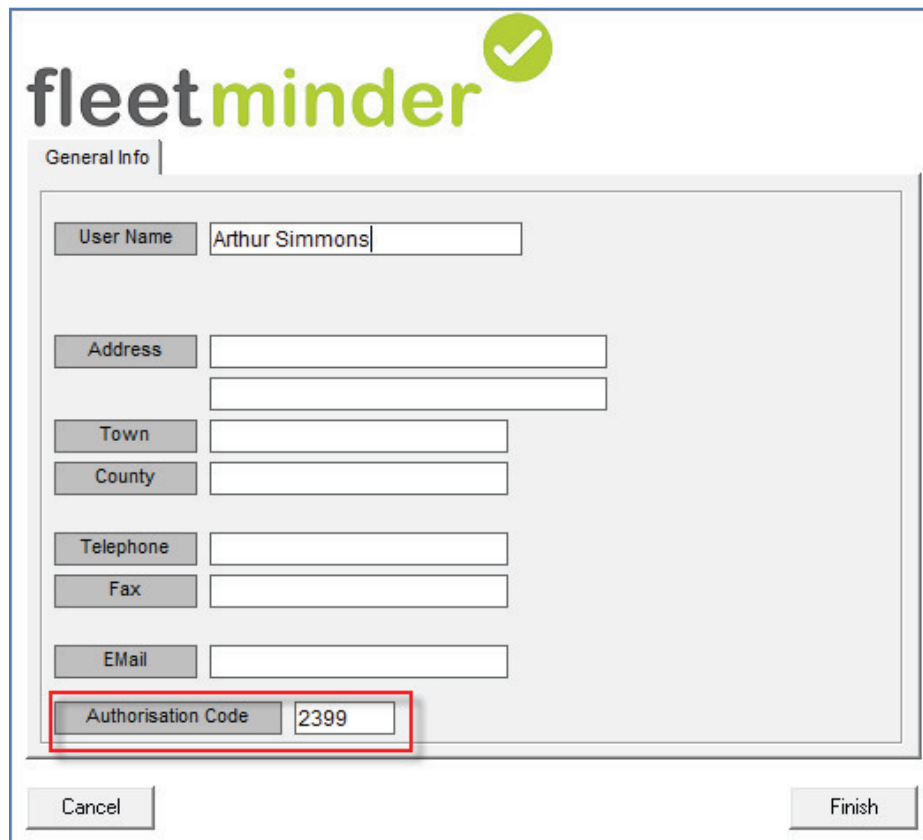
The screenshot shows the 'General Info' section of the 'User Wizard' in FleetMinder. The title bar reads 'fleetminder' with a green checkmark icon. The 'General Info' tab is selected. The form contains the following fields: 'User Name' (filled with 'Arthur Simmons'), 'Address' (two empty lines), 'Town' (empty), 'County' (empty), 'Telephone' (empty), 'Fax' (empty), 'Email' (empty), and 'Authorisation Code' (filled with '2399'). At the bottom are 'Cancel' and 'Finish' buttons.

User Wizard

The first screen that appears is the **General Info** section.

You must enter the user's name at this stage. In our example, we used the username **Arthur Simmons**.

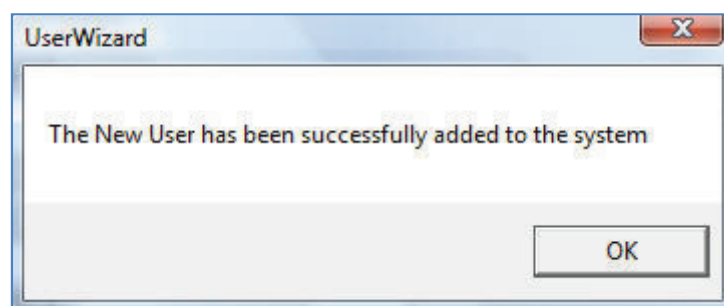
The rest of the information on the page is dependent on whether it is company policy to record it and is not a prerequisite of the system.

The image shows a web form titled 'fleetminder' with a green checkmark icon. Below the title is a tab labeled 'General Info'. The form contains several input fields: 'User Name' (filled with 'Arthur Simmons'), 'Address' (two stacked empty fields), 'Town' (empty), 'County' (empty), 'Telephone' (empty), 'Fax' (empty), and 'Email' (empty). At the bottom of the form, the 'Authorisation Code' field is highlighted with a red rectangle and contains the value '2399'. At the very bottom of the form are two buttons: 'Cancel' on the left and 'Finish' on the right.

Authorisation Code

Note the *Authorisation Code* for the user as this is the password they will use to log onto the FleetMinder system (unless using a biometric scanner).

When you are finished, click the *Finish* button.



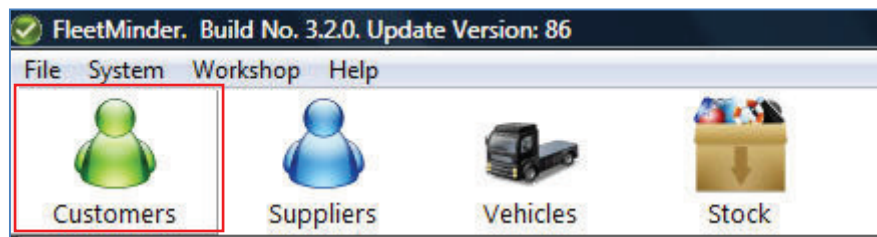
Successful Completion

If everything has been filled in successfully, you will see the above message that the user has been successfully added to the system.

See chapter 13 on user permissions.

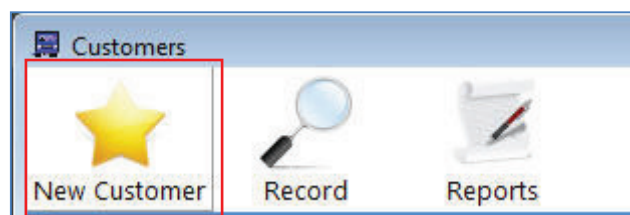
Create a New Customer

Click **Customers** on the top bar of buttons on the main screen.



Customers Section

To enter a new customer on the system, click **New Customer** from the Customers section.



New Customer

This will bring up a **Customer Wizard** screen into which we must fill in the basic details regarding this customer.



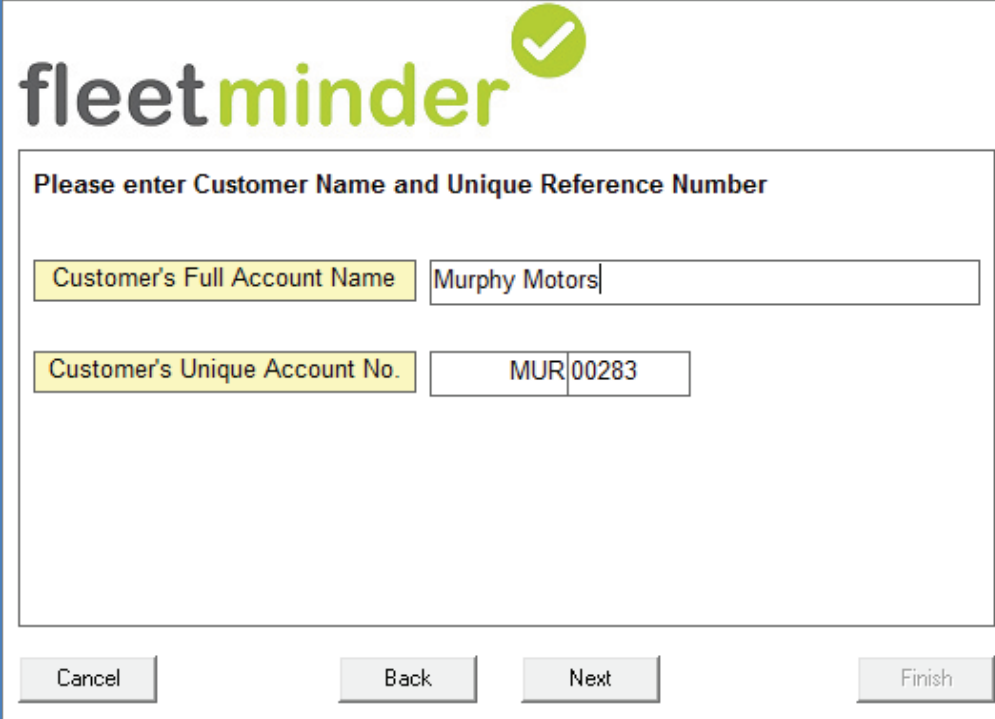
Customer Wizard

The first screen welcomes you to the Customer Wizard and points out the main three items that are needed to enter a customer:

- *Customer's Name and Unique Reference Number*
- *Customer's Address Details*
- *Customer's Contact Information*

Click **Next** to continue to the next screen.

You can click **Cancel** at any time to exit the wizard.



fleetminder

Please enter Customer Name and Unique Reference Number

Customer's Full Account Name Murphy Motors

Customer's Unique Account No. MUR00283


Cancel Back Next Finish

New Customer's Name

The next screen requests the **Customer's Full Account Name**. As you enter the name, the system generates the **Customer's Unique Account No.**

Click **Next** to continue to the following screen.

Click **Back** to return to the previous screen if you wish to alter any details.




Please enter Customer's Address Details

Street 1	12 Main St
Street 2	Dublin
Town	
County	Dublin
Post Code	
Telephone	+353 1224345
Fax	+353 1224355

Customer's Address

The next screen looks for the **Customer's Address** and **Contact Details**. Fill in these details as appropriate. Click **Next** to move onto the next screen.



Please enter Contact information

Email	info@murphymotors.ie
WWW	www.murphymotors.ie
Contact Name	Tom Murphy
Trade Contact	John Treanor
VAT Number	

Contact Information

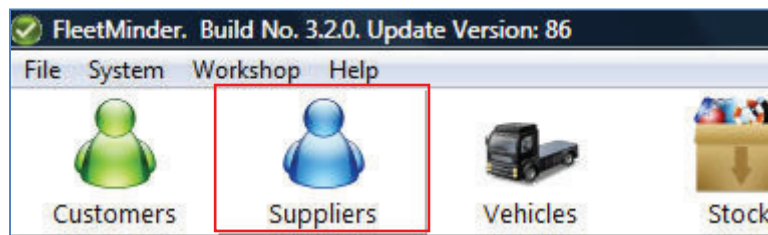
On the final screen there is space for:

- *Email address*
- *WWW website address*
- *Contact Name*
- *Trade Contact name*
- *VAT Number.*

Click on **Finish** to complete the creation of a new customer on your system.

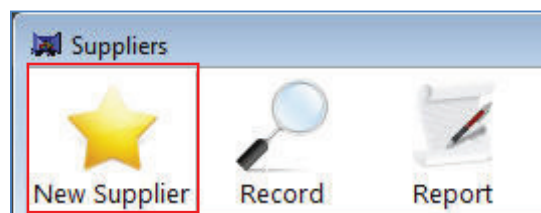
Create a New Supplier

Click **Suppliers** at top bar of buttons on main screen.



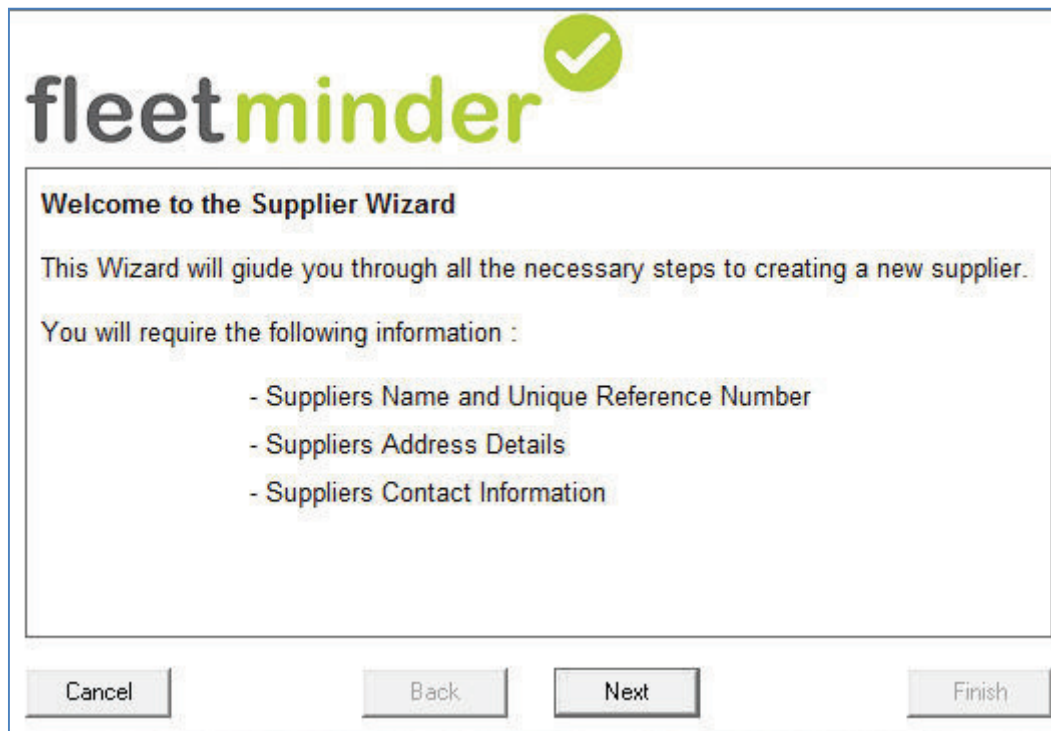
Suppliers section

Click **New Supplier**.



New Supplier

This will bring you to the Supplier Wizard section.



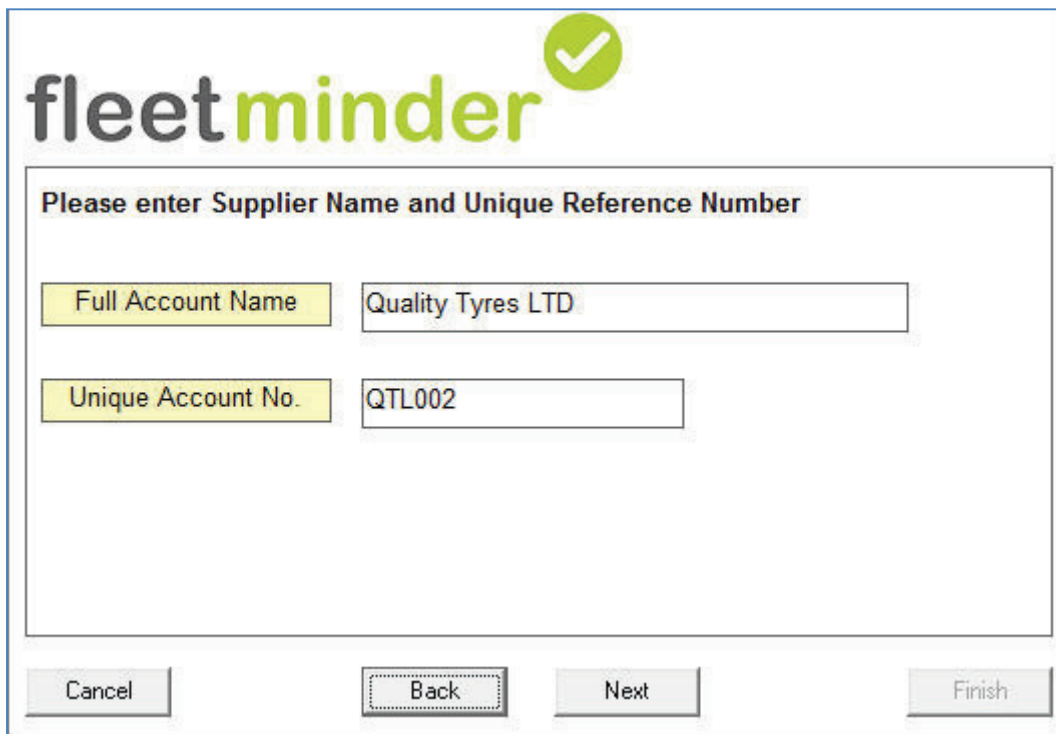
Supplier Wizard

On the first screen of the Supplier Wizard, the system checks that you have all the information that is needed for adding a new supplier to the system:

- *Supplier's Name and Unique Reference Number*
- *Supplier's Address Details*
- *Supplier's Contact Information*

Click **Cancel** if you wish to exit this screen

Click **Next** if you have this information and want to continue with the next screen.



The screenshot shows a web-based form titled "Supplier's Details" with the FleetMinder logo at the top. The form contains two input fields: "Full Account Name" with the value "Quality Tyres LTD" and "Unique Account No." with the value "QTL002". At the bottom, there are four buttons: "Cancel", "Back", "Next", and "Finish". The "Back" button is highlighted with a dashed border.

Supplier's Details

On the next screen you must input the supplier's *Full Account Name* and also their *Unique Account Number*.

Once you have filled these details in, click **Next** to move to the next screen.

If you want to exit, click **Cancel**.

If you need to go back to the previous screen click **Back**.



Please enter Supplier's Address Details

Street 1	North Road
Street2	Galway
Town	co galway
County	
Post Code	

Telephone	123
Fax	321

Cancel Back Next Finish


Supplier's Address

On the next screen, you must enter the supplier's address details. You can also enter the supplier's telephone and fax number.

Click **Next** if you have filled in all the details and wish to continue to the next screen.

Click **Cancel** if you do not want to continue adding this supplier to the system.

Click **Back** if you need to move to the previous screen.



Please enter Contact information

Email	htravors@qualitytyres.co.uk
WWW	www.qualitytyres.co.uk
Contact Name	Harry Travors
Trade Contact	Harry Travors
VAT No.	123BC4

Cancel Back Next Finish

Supplier's Contact Details

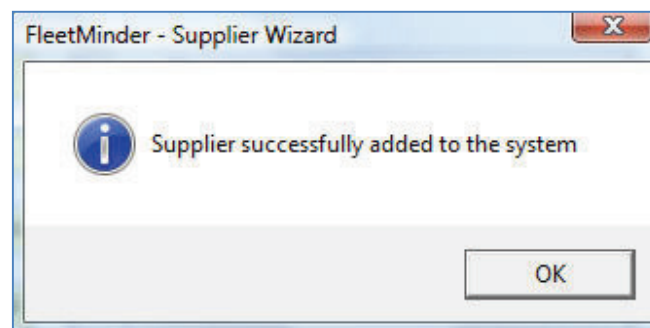
On the next screen you can enter the supplier's:

- *Email Address,*
- *Website Address,*
- *Contact Name,*
- *Trade Contact Name and*
- *V.A.T. Number.*

Click **Finish** to complete the set up of the supplier on the system.

Click **Cancel** to exit this supplier wizard.

Click **Back** to move to the previous screen.



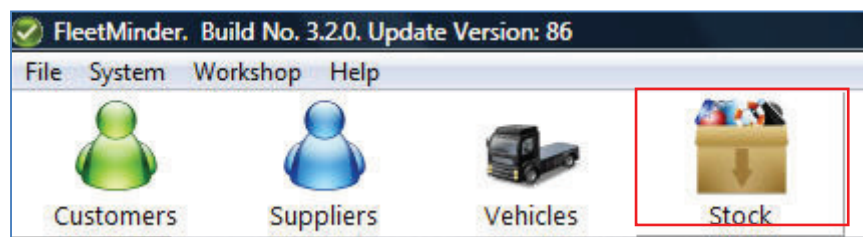
Successfully Added Supplier

Once you have added in all the details successfully a message will appear that will say "Supplier successfully added to the system".

Click **OK** to the message.

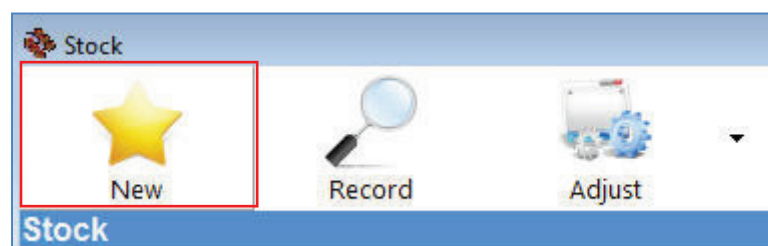
Create a New Stock Item

Click **Stock** on top bar of buttons on main screen.



Stock Section

To enter a new stock item onto the system click **New**.



New Stock Item

This will open the **Stock Wizard**.




Stock Wizard

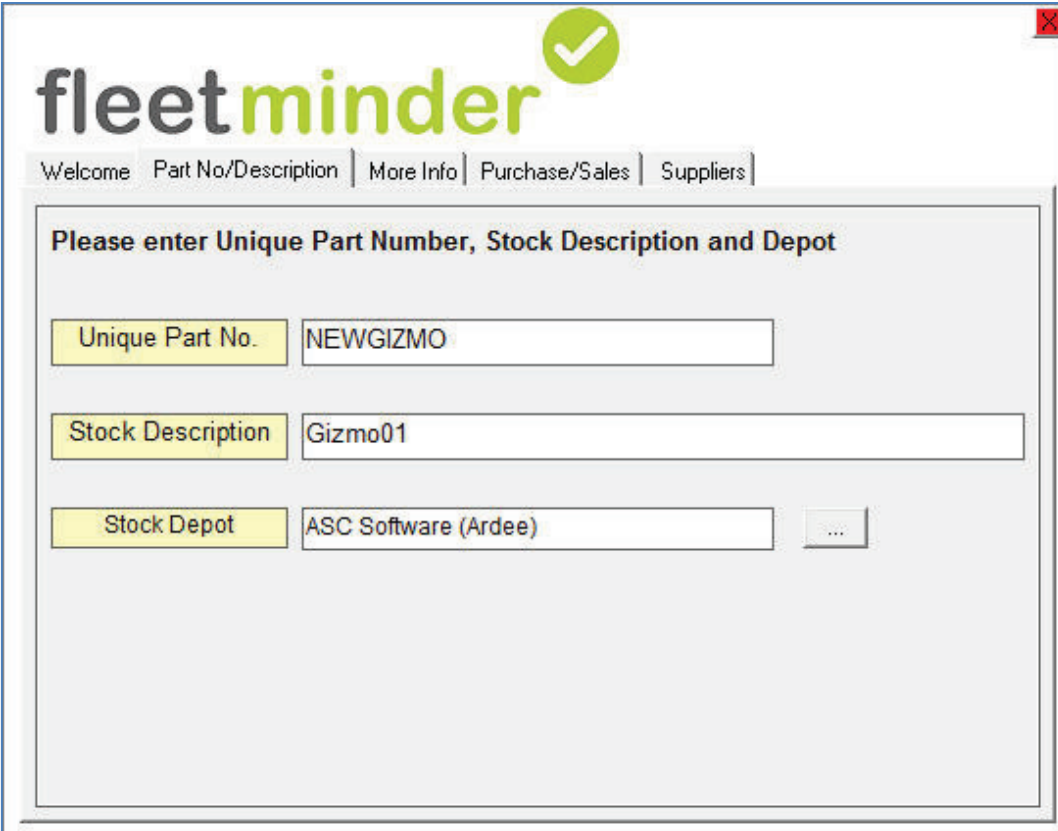
The first screen that appears notifies you of the information that you will need before you can complete adding a stock item to the system.

These items are:

- *Stock Description and Unique Part Number*
- *Product Information*
- *Purchasing and Sales Information*

If you do not have these items, click  to exit the Stock Wizard.

If you have these items, click **Part/Description** to proceed to the next screen.



Part Number / Description / Depot

Click the white box beside **Unique Part No.** and type in a unique identifying number for that stock part.

On the next screen, click the white box beside **Stock Description**. Type in a detailed description of the stock item.

The **Stock Depot** will automatically display your default stock depot, to change the depot select it from the drop down list.

When have filled in the fields, click **More Info** to move onto the next screen.

fleetminder ✓

Welcome | Part No/Description | **More Info** | Purchase/Sales | Suppliers

Please enter Stock Details

Location: A.01

Min Stock: 1 Max Stock: 10

Stock Group: Group: Wipers & Washers ...

Sub Group: Default ...

Purchase VAT Code: VAT @ 15% ...

☐ Serial Number Required

☐ Apply Default Stock Group Discount


Stock Details

On the **More Info** Screen, you must fill in the following fields:

- *Location*
- *Min Stock*
- *Max Stock*
- *Stock Group*
- *Stock Sub Group*
- *V.A.T. Code*

You can also tick the **Serial Number Required** box to ensure that a serial number is always written in whenever a unit of this product is received into stock.

Likewise, ticking **Apply Default Stock Group Discount** will ensure that the default stock group discount is always applied to this part number.

Click  if at any time you wish to stop filling in this stock item.

fleetminder ✓

Welcome | Part No/Description | More Info | Purchase/Sales | Suppliers

Please enter Product Sales Details

Purchase Price: 10

V.O.R. Price: 0

Purchase Unit: 1

Purchase NI Description: Parts For Resale

Selling Price: 13

Selling Unit: 1

Selling NI Description: Labour Sales

Select From List -->

- Parts Sales
- Labour Sales
- Enviromental Waste Charges
- Garage Equipment
- Vehicle Sales
- Muni Sales
- Alan Vehicle Sales

Product Sales Details

On this screen you must enter:

- *Purchase Price*

Optional fields that can be entered at this time are:

- *V.O.R. Price*
- *Selling Price*
- *Selling Unit*
- *Purchase Unit*
- *Purchase Ledger Description*
- *Sales Ledger Description*

Click **Suppliers** and in the *Supplier* field, type in some or the entire name of the supplier you wish to find and press **Enter**.

fleetminder ✓

Welcome | Part No/Description | More Info | Purchase/Sales | Suppliers

Please Enter Supplier Details

Supplier: Ab

Selected Suppliers:

Save

Supplier Search

A grid of available Suppliers will appear.

Ref	Name	Address
ADK001	A OK RADIATOR SERVICES	4 BALLYMOUNT ROAD LR
A&M001	A&M GEARBOX CENTRE	180 JAMES ST.
AEF001	A.E.F. LTD	KYLEMORE PARK SOUTH
ATA001	A.T.A. SECURITY LTD	1a LEINSTER ST. NORTH.
SCH001	A.u.H. SCHNEIDER GmbH	RICHTSTRASSE 32
SCH001	A.u.H. SNEIDER GMBH & CO.KG	RICHTSTRASSE 32
AAAAAA1	aaaaaaa	...
ABB001	ABBEY SEALS	JOHN F KENNEDY ROAD
ABTRON	Abtron Engineering	Brides Glen Road
ACC001	ACCESS CLEANING SERVICES	11 WALKINSTOWN AV
0036	ACCESS TELECOM	COMMUNICATIONS HOUSE
CHR001	AD IRELAND	520 BEECH ROAD

Select Supplier

Click the Supplier to highlight it and click **Use**.

FleetMinder supports multiple suppliers for the same stock item, so to add another supplier for this stock item, repeat the steps above.

If you do not see the supplier you need in the list and wish to exit to repeat the search, click **Cancel**.

fleetminder ✓

Welcome | Part No/Description | More Info | Purchase/Sales | **Suppliers**

Please Enter Supplier Details

Supplier

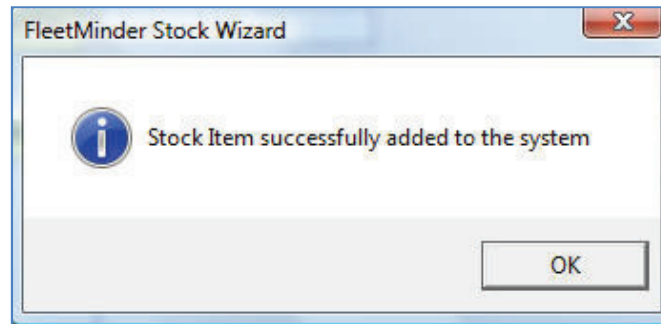
Selected Suppliers

Ref No.	Name
ABB001	ABBEY SEALS

Save

Supplier Added

Click **Save** to save all the information to complete the generation of this stock item on the system.

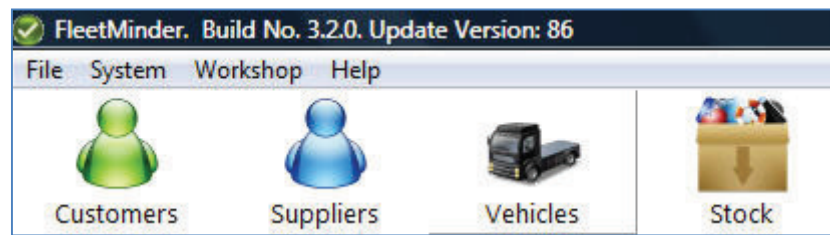


Stock Added Successfully

A message will be displayed confirming that this item was successfully added to stock.

Create a New Vehicle:

Click **Vehicles** at top bar of buttons on the main FleetMinder screen.



Vehicles Section

To enter a new vehicle on the system, click **New Vehicle**.



New Vehicle

This will bring up the **Vehicle Wizard** screen which must be filled in with all the basic details regarding the vehicle. There are numerous optional details which will help you keep a comprehensive overview of each vehicle.

The screenshot shows the 'Vehicle Wizard' screen. At the top, the 'fleetminder' logo is displayed with a green checkmark icon. Below the logo is a tabbed interface with four tabs: 'Vehicle Details' (highlighted with a red rectangle), 'Optional Details', 'Owner Details', and 'Reminder'. The 'Vehicle Details' tab contains several input fields: 'Registration Number' (08D12345), 'VIN (Chassis Number)' (123452342), 'Engine Number' (empty, marked '* Optional'), 'Manufacturer' (DAF), 'Model' (150), 'Odometer' (1000), 'Year of Manufacture' (2008, marked '* Optional'), 'Registration Date' (11/09/2008), and 'Fleet Number' (empty, marked '* Optional'). There are also radio buttons for 'Kilometers' (selected) and 'Mileage'. At the bottom, there are 'Cancel' and 'Finish' buttons.

Vehicle Details

Vehicle Details

On the first screen, *Vehicle Details*, you fill in the basic necessary details of the vehicle:

- *Registration Number*
- *VIN (Chassis Number)*
- *Manufacturer*
- *Model*

You can also fill in the:

- *Engine Number*
- *Odometer (in Kilometres or Miles)*
- *Year of Manufacture*
- *Registration Date*
- *Fleet Number*

Click **Cancel** to exit this wizard at anytime.

Owner Details

The screenshot shows the 'fleetminder' software interface. The 'Owner Details' tab is selected and highlighted with a red box. The 'Vehicle Owner' field contains 'ALAN MCGEE'. A 'Customer List' dialog box is open, displaying a table with customer information.

Ac/No	Customer Name	Town
ALA08035	ALAN MCGEE	Ardee
ALA09188	Alan McGee	Dundalk

The dialog box has 'New' and 'OK' buttons at the bottom.

Search for the Vehicle Owner

To fill in the *Vehicle Owner* we need to search for a customer to see if they are on the system already.

Click on the text box below *Vehicle Owner* label and type in part, or all, of the customer's name then press **Enter** on keyboard.

If the customer is on the system, or there are a few customers with names containing the search input that you wrote (for example, if you only wrote in a surname, "*Jones*" then the system would display all your customers with Jones in the name, "*Jones Transport*", "*Martin Jones*" and so forth) then the system will display a list of all relevant results.

If the customer is in the list, click on the customer's name and then click **OK**.

If the system cannot find a customer of that name on the system, it will prompt you to add a new customer via the **Customer Wizard**. Likewise, if none of the customers in the result-list was the correct one and you want to add the customer, then click on **New** and carry out the steps as described in Customers section of the Manual.

In this example, there were two customers on the system with the name *Alan McGee* so we will choose the one from Ardee. We simply click on it and then click **OK**.

The screenshot shows the 'fleetminder' software interface. At the top, there's a green checkmark icon. Below it, the 'fleetminder' logo is displayed. The interface has four tabs: 'Vehicle Details', 'Optional Details', 'Owner Details', and 'Reminder'. The 'Vehicle Owner' section is active, showing a text box with 'ALAN MCGEE' and a list of suggestions: 'Ardee Business Park', 'Ardee', 'C.o Louth', and 'ALA08035'. The 'Invoice To' section is also active, with a checked 'Same as Owner' checkbox and identical text box and list. At the bottom, there are 'Cancel' and 'Finish' buttons.

Vehicle Owner

Now you must select who is invoiced when any work is done on the vehicle.

If the invoicee is the same as the Vehicle Owner, then click the **Same As Owner** box, as in this example.

However, if the customer who is invoiced, is different to that of the vehicle owner (in circumstances where vehicles are leased, for example) you must carry out a search on the *Invoice To* side of the owner details as you did with the *Vehicle Owner* section.

Type part, or all, of the invoicee's name in the text box beneath the *Invoice To* label. Press **Enter** on the keyboard.

If the invoicee is on the system in the list of customers then it will bring up their details for your selection.

If not, it will point out that this customer is not on the system and bring you to the *Customer Wizard* as described in *Customers* section in this manual.

The screenshot shows the 'fleetminder' software interface. The main window has tabs for 'Vehicle Details', 'Optional Details', 'Owner Details', and 'Reminder'. The 'Vehicle Owner' section is active, showing a form with the name 'ALAN MCGEE' entered. A 'Customer List' dialog box is open in the foreground, displaying a table of customers. The table has three columns: 'Ac/No', 'Customer Name', and 'Town'. It lists two customers: 'ALA09188 Alan McGee Dundalk' and 'ALA08035 ALAN MCGEE Ardee'. The dialog box has 'New' and 'OK' buttons at the bottom. The background window has a 'Cancel' button at the bottom left.

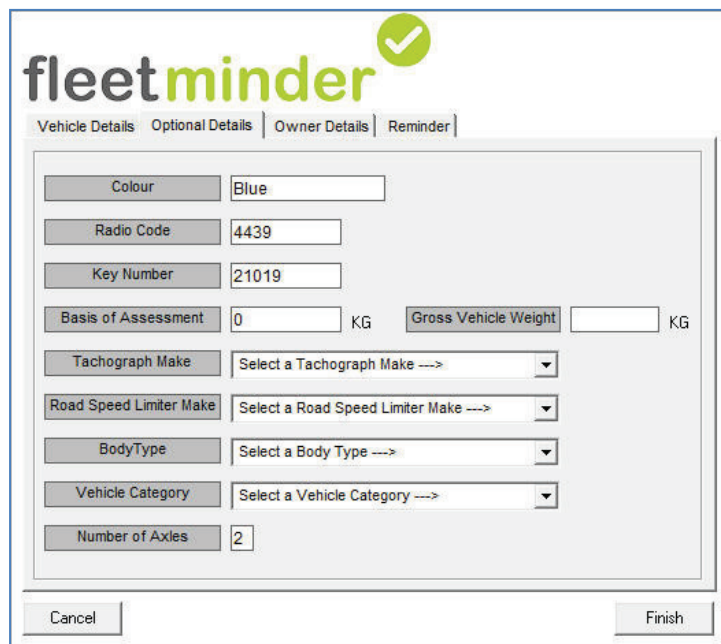
Ac/No	Customer Name	Town
ALA09188	Alan McGee	Dundalk
ALA08035	ALAN MCGEE	Ardee

Different Invoicee to Vehicle Owner

At this stage you can click **Finish** to complete the *Vehicle Wizard*.

However, you can also fill in the optional sections.

Optional Details



fleetminder ✓

Vehicle Details | **Optional Details** | Owner Details | Reminder

Colour: Blue

Radio Code: 4439

Key Number: 21019

Basis of Assessment: 0 KG Gross Vehicle Weight: KG

Tachograph Make: Select a Tachograph Make ---->

Road Speed Limiter Make: Select a Road Speed Limiter Make ---->

Body Type: Select a Body Type ---->

Vehicle Category: Select a Vehicle Category ---->

Number of Axles: 2

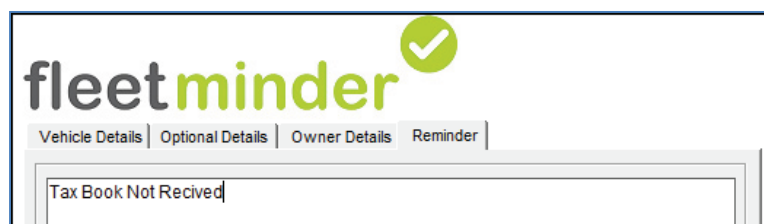
Cancel Finish

Optional Details Sections

The tabs *Optional Details* and *Reminder* are optional and can be skipped. If you want to fill them in, some or all of the following details must be known. In the *Optional Details* section you can fill in:

- *Colour*
- *Radio Code*
- *Key Number*
- *Basis of Assessment*
- *Gross Vehicle Weight*
- *Tachograph Make*
- *Road Speed Limiter Make*
- *Body Type*
- *Vehicle Category*
- *Number of Axles*

In the *Reminder* section you can fill in any reminder for the vehicle that you wish to appear next time you are generating a Job Card. In this example, we noted that "*Tax Book Not Received*". When you generate a Job Card for this vehicle it will recognise this note and prompt you accordingly.



fleetminder ✓

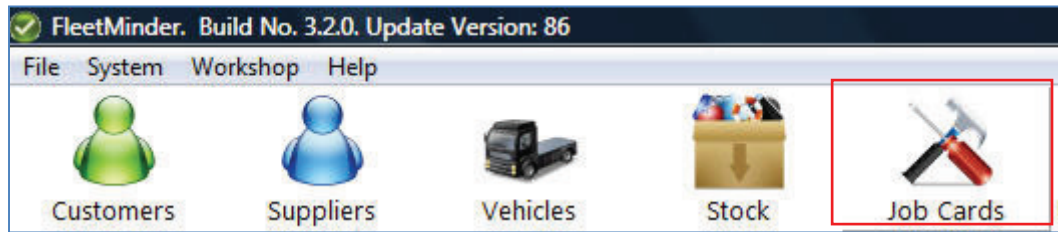
Vehicle Details | Optional Details | Owner Details | **Reminder**

Tax Book Not Recived

Reminder

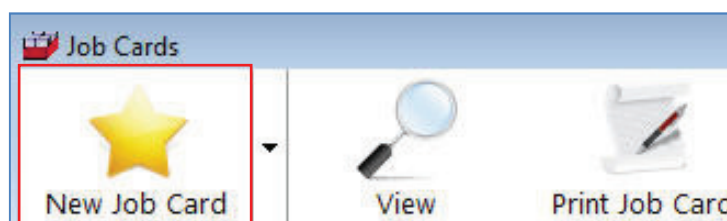
Create a New Job Card

Click **Job Cards** at top bar of buttons on main screen.



Job Cards Section

To enter a new Job Card on the system, click **New** from the Job Card section.



New Job Card

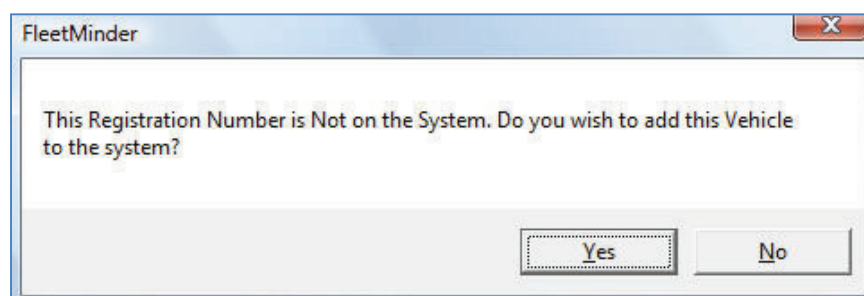
This will bring you to the Job Card setup screen.

The screenshot displays the 'New Job Card' setup window. It features a 'Job Header' section with various input fields. The 'Registration No.' field, containing the text '93D3503', is highlighted with a red rectangular box. Other fields include 'Engine No.', 'VIN No.', 'Customer Ref', 'SONO', 'Make', 'Model', 'Mileage / KM', 'Business Type', 'Body Type', 'Veh Catg', 'Stock No', 'Year of Manu', 'Yr1st Reg', 'Axles', 'Completion Date', and 'Select Vehicle Depot'. At the bottom right are 'Cancel' and 'Continue' buttons.

Job Card

Type in the *Registration No.* of the vehicle and press **Enter**.

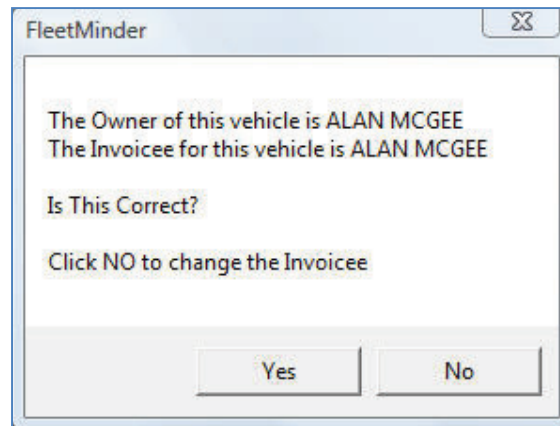
If the vehicle is not known to FleetMinder then you will be prompted to add the vehicle using the *Vehicle Wizard*.



Unknown Registration

If the vehicle is known to FleetMinder then its details will automatically be pulled from the database.

You will be prompted to check whether the *Owner* and *Invoicee* details are correct before starting.

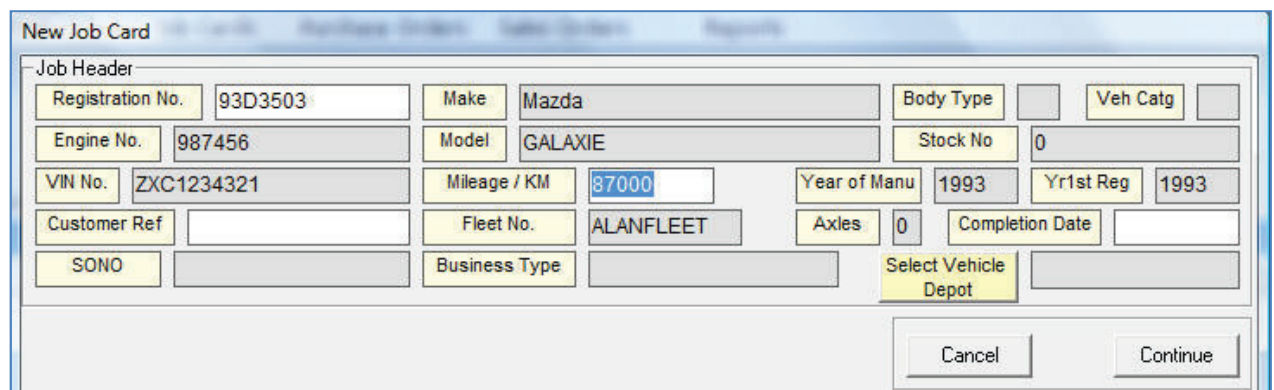


Check Invoicee

If you are happy with the invoicee details, click **Yes** to confirm it is correct.

If you are not happy with the invoicee details, click **No** and you will be brought to the section where you can alter the invoicee for the job card for this vehicle.

The system will fill the details at the top of the Job Card regarding the vehicle.



Vehicle Details

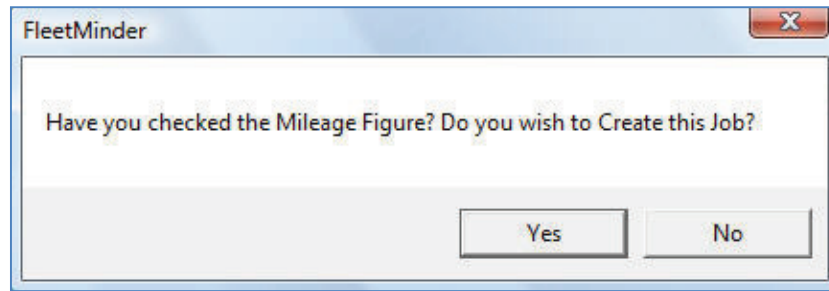
Ensure that the mileage/km is correct as this is relevant for the updating of the Service/ Calibration area which is triggered by distance travelled as well as amount of time that is passed.

Click **Continue**.

Fleetminder queries as to whether you have checked the *Mileage Figure* and also whether you actually want to create the job.

If you want to continue, click **Yes**.

If you want to abandon this job card, then click **No**.



Odometer Confirmation

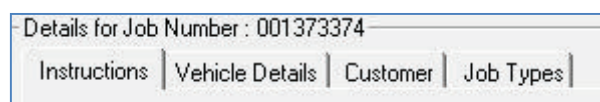
You will then be brought to a reduced version of the job card where you can enter the basic information necessary to start the job card.

 A screenshot of the "New Job Card" form. The form is divided into several sections. The top section, "Job Header", contains fields for Registration No. (93D3503), Make (Mazda), Body Type, Veh Catg, Engine No. (987456), Model (GALAXIE), Stock No. (0), VIN No. (ZXC1234321), Mileage / KM (87000), Year of Manu (1993), Yr1st Reg (1993), Customer Ref, Fleet No. (ALANFLEET), Axles (0), Completion Date, SONO, Business Type, and a Select Vehicle Depot button. Below this is a section titled "Details for Job Number : 001373374" with four tabs: Instructions, Vehicle Details, Customer, and Job Types. The Vehicle Details tab is currently selected, showing a large empty text area. On the left side of this area is a green circular button with a white plus sign and the word "Add" below it. At the bottom right of the form are "Save" and "Close" buttons.

Basic Job Card

There are 4 tabs available:

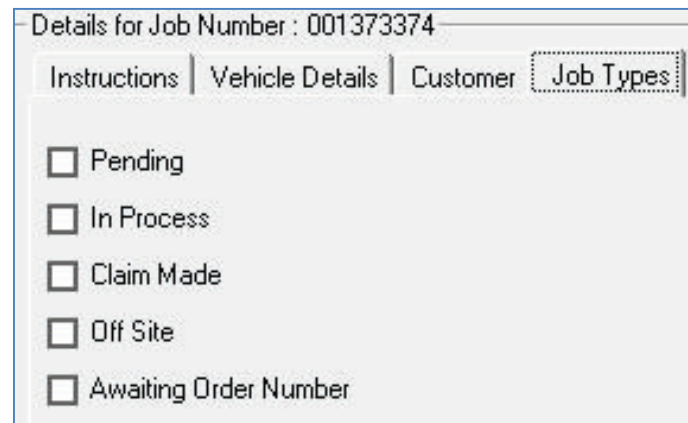
- *Instructions* – see the next section for details
- *Vehicle Details* – a read-only summary of the vehicle details
- *Customer* – details of the customer and invoicee
- *Job Types* – details on the type of work to be carried out.



Tabs

Vehicles Details and *Customer* are read-only so they can only be viewed. Instructions are dealt with in the next section.

The *Job Types* tab contains checkboxes that can be used to bring certain types of job to the attention of the mechanics.

A screenshot of a software window titled "Details for Job Number : 001373374". The window has four tabs: "Instructions", "Vehicle Details", "Customer", and "Job Types". The "Job Types" tab is selected and highlighted with a dashed border. Inside this tab, there are five checkboxes, each followed by a label: "Pending", "In Process", "Claim Made", "Off Site", and "Awaiting Order Number". All checkboxes are currently unchecked.

Job Types

Clicking on a checkbox will automatically add an instruction to the Job Card.

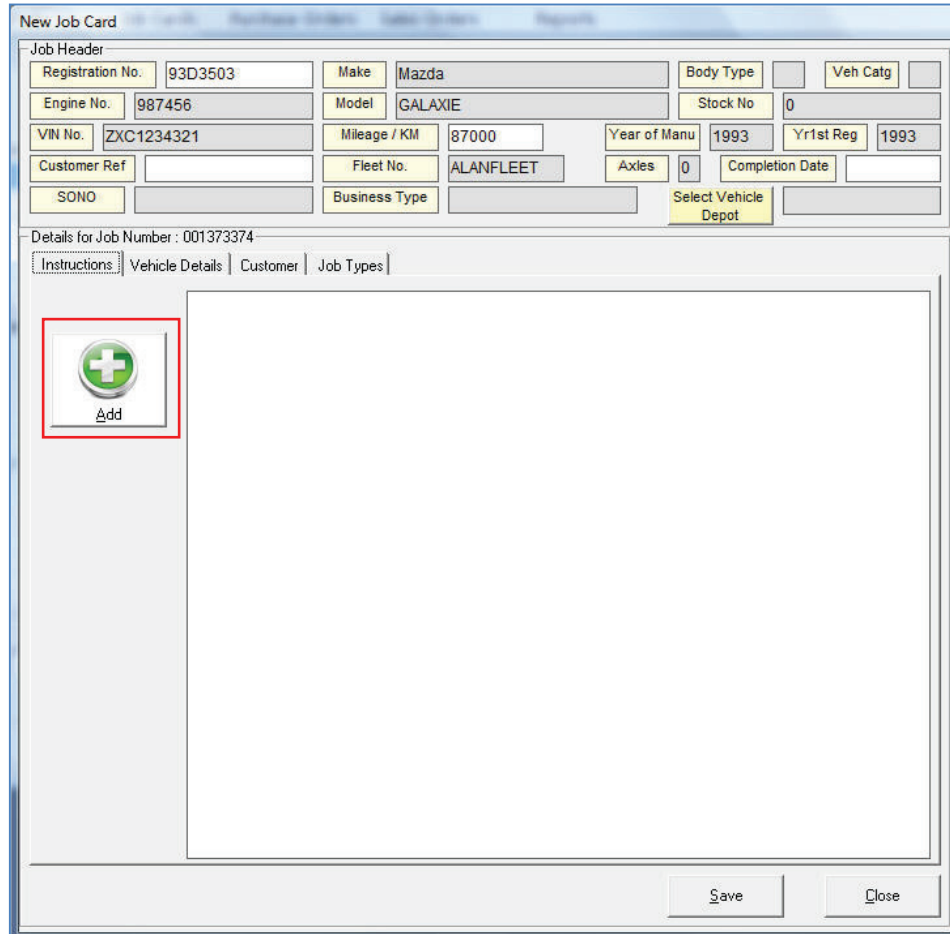
At this stage you can click **Save** to save the Job Card, or click **Close** to close the Job Card.

Or, to add instructions to the Job Card, continue to the next section.

Add an Instruction to a Job Card

Click on the **Instructions** tab.

Click on the **Add** button.



The screenshot shows a 'New Job Card' window with a 'Job Header' section containing various input fields for vehicle and job details. Below this is a 'Details for Job Number : 001373374' section with tabs for 'Instructions', 'Vehicle Details', 'Customer', and 'Job Types'. The 'Instructions' tab is active, and a red box highlights a green circular button with a white plus sign and the word 'Add' below it. At the bottom right of the window are 'Save' and 'Close' buttons.

Job Header			
Registration No.	93D3503	Make	Mazda
Engine No.	987456	Model	GALAXIE
VIN No.	ZXC1234321	Mileage / KM	87000
Customer Ref		Fleet No.	ALANFLEET
SONO		Business Type	
Body Type		Stock No	0
Year of Manu	1993	Yr1st Reg	1993
Axles	0	Completion Date	
		Select Vehicle Depot	

Details for Job Number : 001373374

Instructions | Vehicle Details | Customer | Job Types

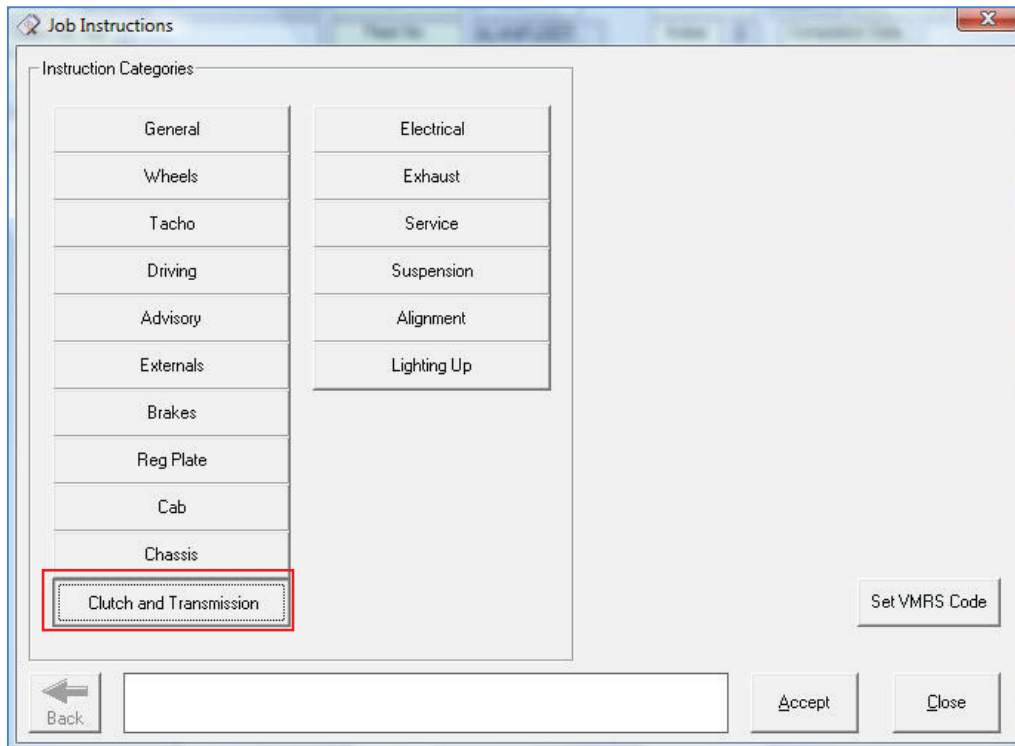
Add

Save Close

Add an Instruction

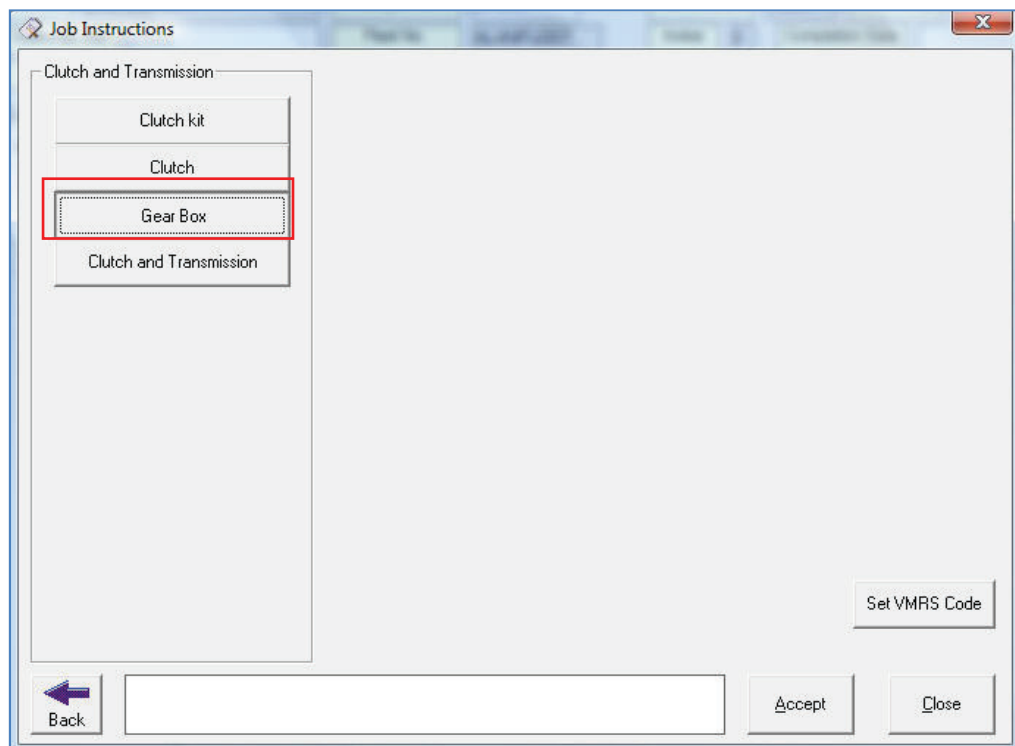
During setup of the system, your administrator will have generated a list of instruction categories and sub-details. In the example here, we have used a frequently occurring item, but it may not be in the same location and you must familiarise yourself with your companies' selected Instruction Categories and Sub-Details.

Click on the *Instruction Category* that you wish to use. Our example has selected **Clutch and Transmission** button.



Select Instruction Category

Next, click on the *Sub-Detail*.
In our example, we have selected ***Gear Box***.

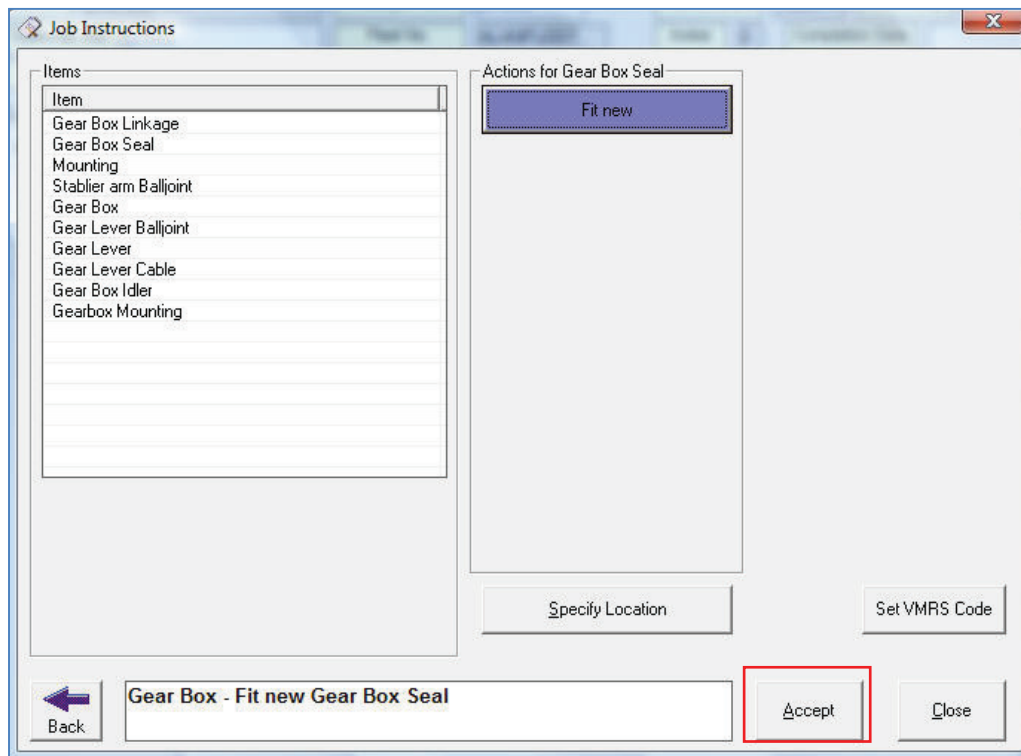


Sub-detail

The next screen prompts us to select an *Item*, in our example, we select ***Gear Box Seal***.

When we click on the item we want to select, a list of *Actions* appears to the right. Click on the *Action* you wish to instruct to carry out on the Item. In our example, we have one action button, ***Fit new*** and so we click it.

At the bottom the constructed sentence appears:
“Gear Box – Fit new Gear Box Seal.”

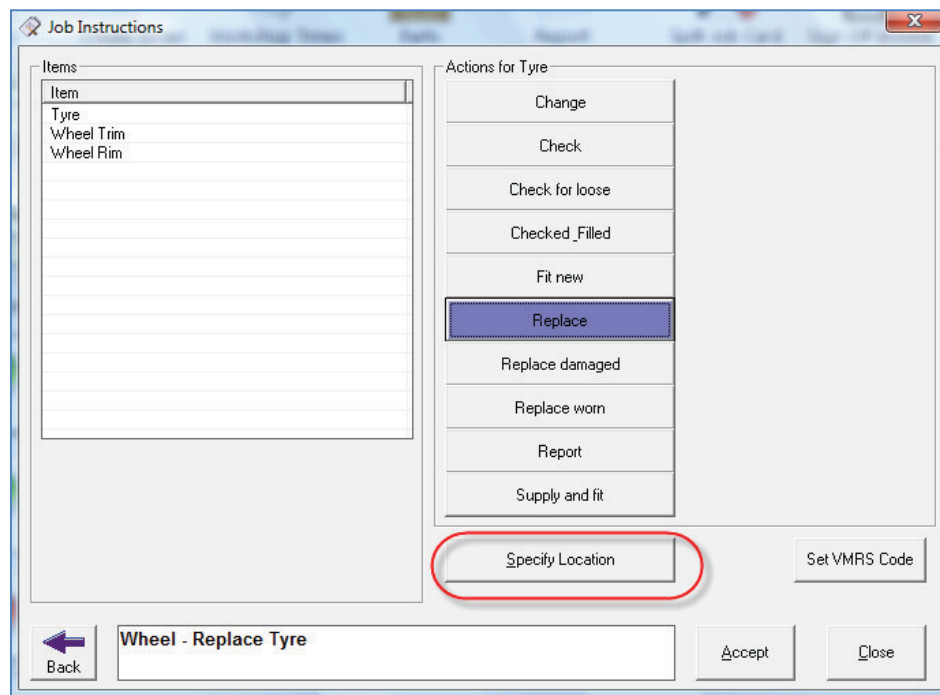


Selecting the Item and Action

Click ***Accept*** to complete the instruction generation process.

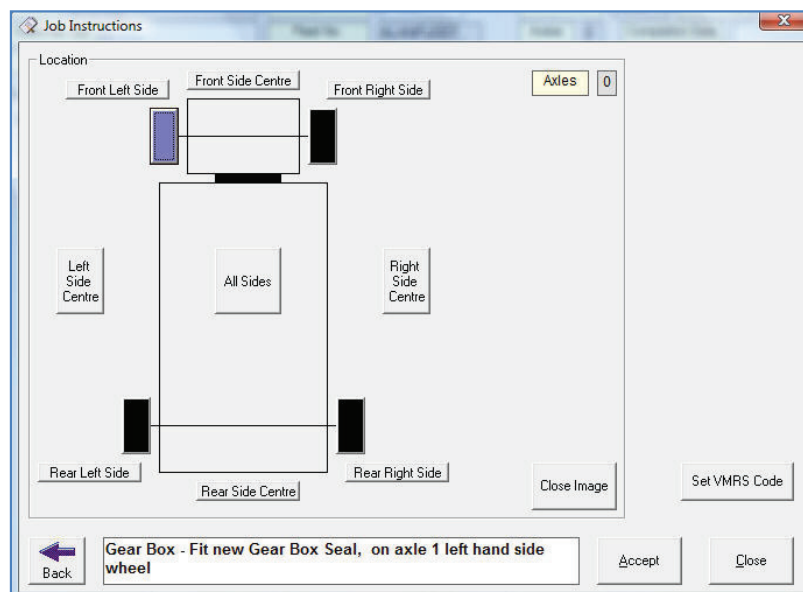
Specify a Location in a Job Instruction

Before you click on **Accept** to save the instruction and close that section, click on the **Specify Location** button.



Specify Location

This will display a basic aerial image of the vehicle.



Choose a Location

You can then specify which location the instruction is to be carried out on. In this example it is to replace the damaged tyre on the left at the front (axle 1) of the vehicle.

The locations that are available are:

- *Front Left Side*
- *Front Side Centre*
- *Front Right Side*
- *Right Side Centre*
- *Rear Right Side*
- *Rear Side Centre*
- *Rear Left Side*
- *Left Side Centre*
- *All Sides.*

The button will turn from grey colour to a blue colour to show it is logged. It will also appear in the written instruction in the text box at the bottom of the screen.

You can select more than one location by simply clicking on the required locations.

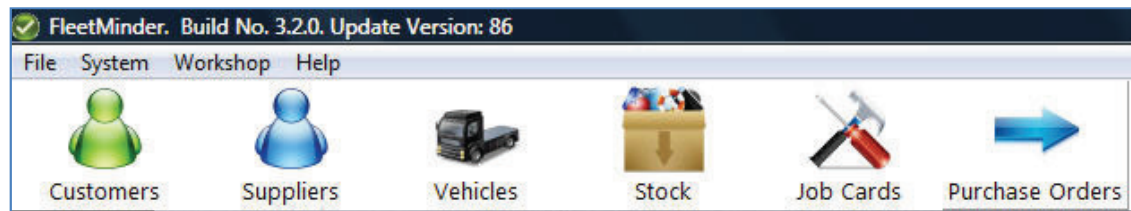
If the vehicle image hasn't enough axles, alter the value in the axles' box in the top right corner.

Click on the tyre image to indicate which tyre needs attention.
The image of the tyre will change colour when it is clicked, going from black colour to a blue colour to show it is logged.

Click **Accept** to store the Instruction created or click on **Close Image** to exit without saving.

Create a New Purchase Order

To enter the Purchase Order Processing section of FleetMinder, click **Purchase Orders** from the main screen.



POP (Purchase Order Processing) Section

To generate a new Purchase Order Process, click on **Enter**.



New Purchase Order

Type in either all or part of the Account Number of the supplier or else all or part of the supplier's name in the **AC No.** field.

In this example, we wrote in "ASC".

Press **Enter** on your keyboard.

The screenshot shows the 'New Purchase Order' form. It has a title bar with 'New Purchase Order'. Below the title bar are two tabs: 'Details' and 'Order Details'. The 'Details' tab is active. It contains several input fields: 'AC No.' with 'ASC' entered, 'Cust ref' (empty), 'Date' with '28/07/2009' and a dropdown arrow, 'Order No' with '106191', and 'Purchase Discount Type' (empty) with a dropdown arrow. There is also a large empty text area on the right side of the form.

Selecting A/C number

This will display a list of suppliers meeting the search criteria. The more detailed the search criteria, the fewer suppliers that will be suggested in the list.

Search

Search for Supplier

Ref	Name	Address
ASC002	ASC GARAGE EQUIPMENT INSTALLATIONS	UNIT 58 LE BROQUAY AVENUE
ASC002	ASC GARAGE EQUIPMENT INSTALLATIONS ...	UNIT 58 LE BROQUAY AVENUE ...
ASC001	ASC REMANUFACTURING	UNIT 58 LE BROQUAY AVENUE ...
ASCSOFTW	ASC Software Ltd	58 Le Broquay Avenue
ASCSOFTW ...	ASC Software Ltd	58 Le Broquay Avenue ...
LHUNGER	LUDWIG HUNGER Maschinenfabrik GmbH	D-86916 Kaufering
LHUNGER	LUDWIG HUNGER MASCHINENFABRIK GmbH ...	POSTFACH 1261 ...
PAS001	PASCAL SOFTWARE LTD	20 LONGFORD TERRACE
ASC001	ZZ DO NOT USE ASC GARAGE EQUIPMENT	UNIT 58, LE BROQUAY AVE.

Use Cancel

Select the Supplier

Click on the required supplier so that it is highlighted in blue.

Click **Use**.

If the supplier you are looking for is not there, click **Cancel** to exit this section.

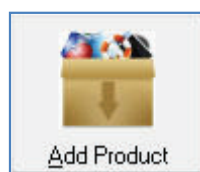
New Purchase Order

Details | Order Details

AC No.	ASCSOFTW	Cust ref		ASC Software Ltd 58 Le Broquay Avenue Parkwest Industrial Park Dublin 12
Date	13/07/2009	Order No	106071	
Purchase Discount Type	0000 : n/a			


Supplier Selected

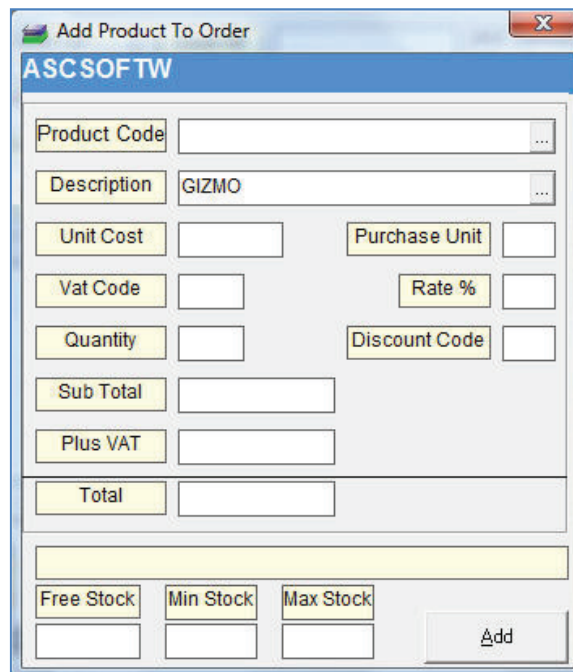
To add an item to the Purchase Order, click **Add Product**.



Add Product

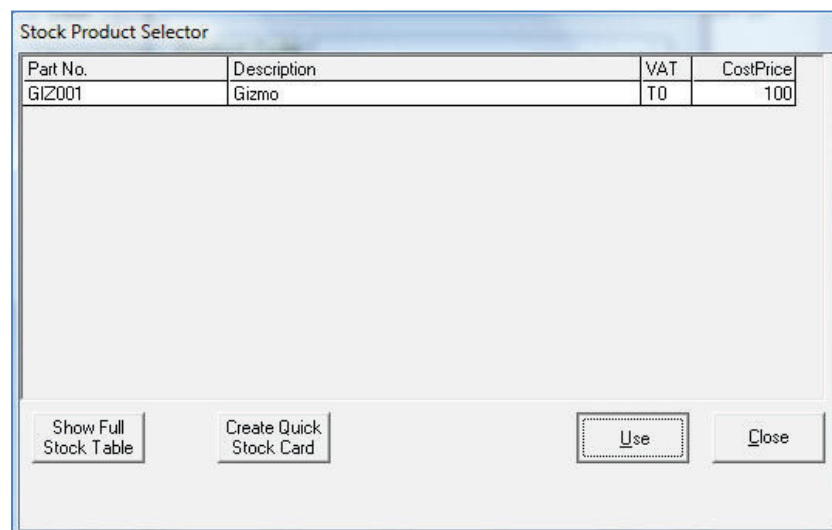
A new screen will display looking for either all or part of the **Product Code** or the **Description** of the product.

Type in all or part of the *Product Code* or *Description* and press **Enter**.
Alternatively, click the display button () to show the full list of items from this Supplier.



Search by Description

The more detailed the search criteria, the fewer items that will appear in the list, making it easier to find the product item you want.



Part No.	Description	VAT	CostPrice
GIZ001	Gizmo	T0	100

Select a Product

However, if the item you are looking for is not in the returned selection, you can click **Close** and do a more accurate search from the previous screen. You will be prompted to fill in the *Quantity* of this item you wish to order.

Add Product To Order

ASC SOFTW

Product Code: GIZ001

Description: Gizmo

Unit Cost: 100 Purchase Unit: 1

Vat Code: T0 Rate %: 0

Quantity: 2 Discount Code:

Sub Total: 200.00

Plus VAT: 0.00

Total: 200.00

Free Stock: 93 Min Stock: 10 Max Stock: 100

Add

Enter Quantity

Click **Add** once the quantity has been filled in.

New Purchase Order

Details | Order Details

AC No: ASC SOFTW Cust ref: Date: 13/07/2009 Order No: 106071

Purchase Discount Type: 0000 : n/a

Stock Depot: ASC Software (Ardee)

ASC Software Ltd
58 Le Broquay Avenue
Parkwest Industrial Park
Dublin 12

Part No	Qty	Price	Vat Code	Net	VAT	Gross
GIZ001	2	100.00	T0	200.00	0.00	200.00

Add Product

Total: 200.00 VAT: 0.00 Grand Total: 200.00

Save ☐ Auto Receive Parts Close

Purchase Order

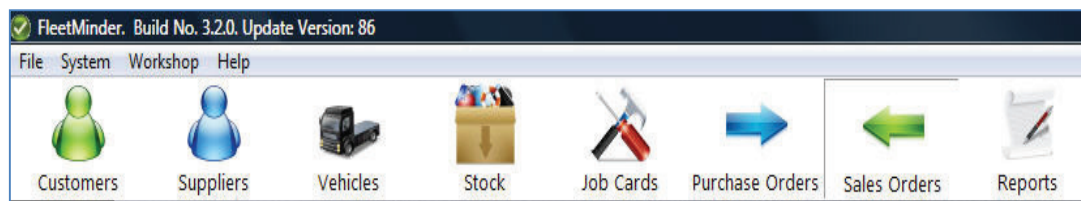
The purchase order with the supplier name and the product to be ordered is displayed.

You can click on **Add Product** to add more items to the Purchase Order.
Click on **Save** to save the Purchase Order.

Note – the Purchase Order will not be put on order until you click on Put On Order.

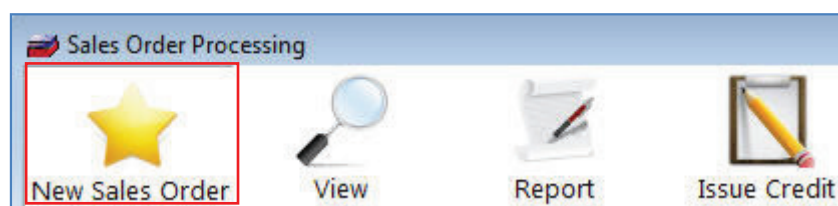
Create a New Sales Order

To enter Sales Order Processing (SOP) section of FleetMinder, click **SOP** button from the main menu.



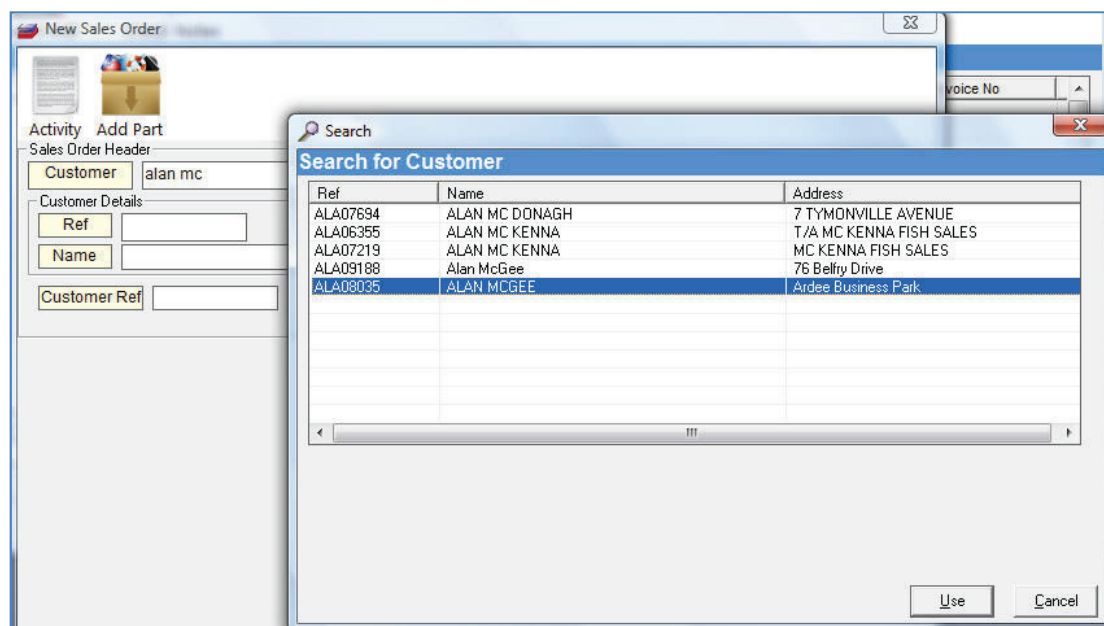
SOP (Sales Order Processing) Section

To generate a new Sales Order, click **New** from the main Sales Order menu.



New Sales Order

To start a sales order, you must select a *Customer*. Type in some or the entire name of the Customer in the *Customer* field and press **Enter**.



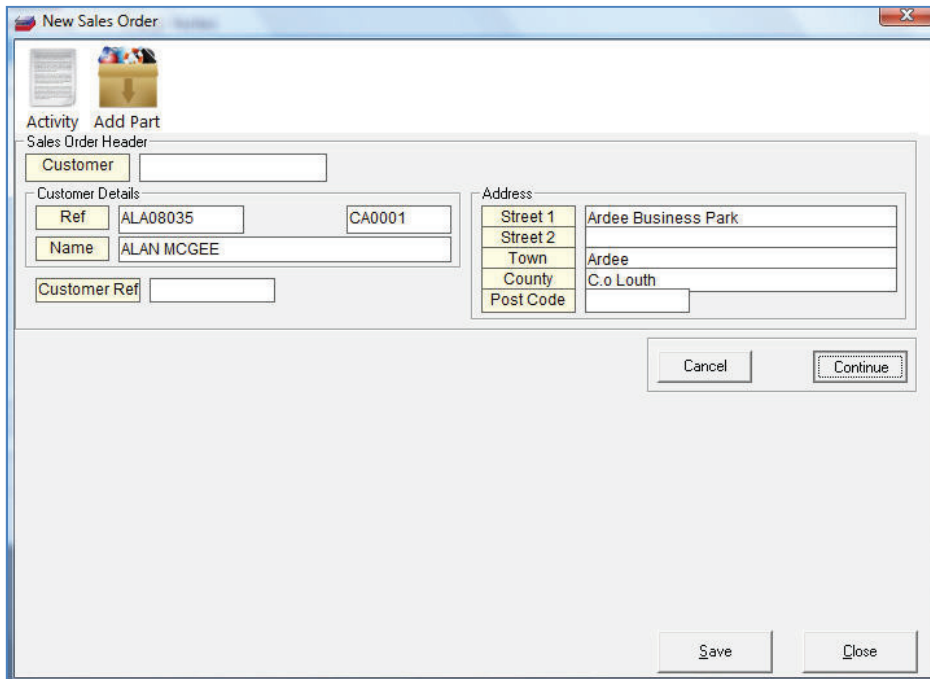
Select the Customer

A search screen will appear displaying all the customers that match your search criteria.

To exit this screen and go to the previous screen without selecting a customer, click **Cancel**.

To select a customer, click on them in the grid to highlight them and then click **Use**.

Once you are happy with the customer's details, click **Continue** button.

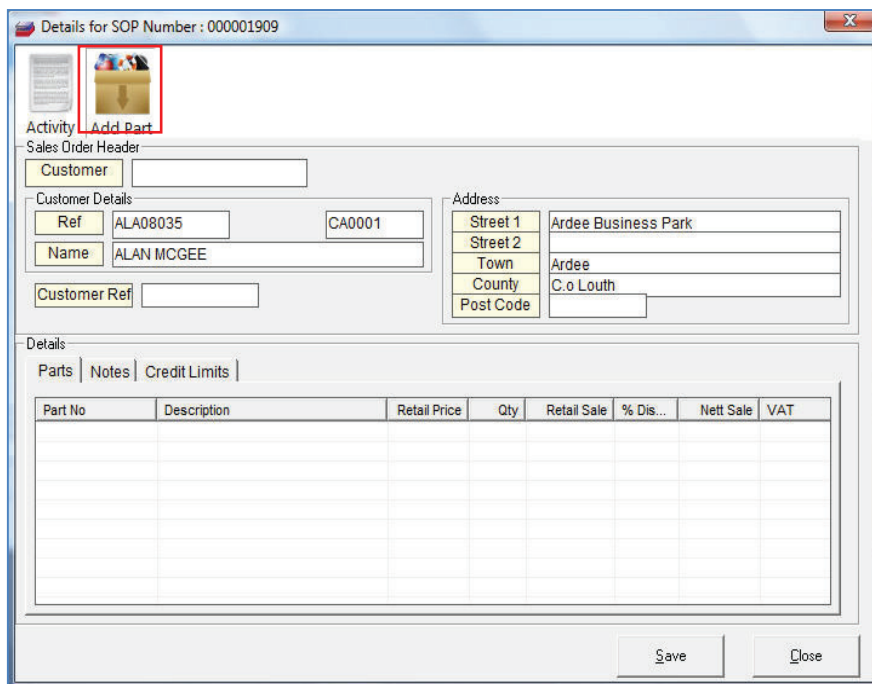


The 'New Sales Order' window displays the 'Sales Order Header' section. It includes a 'Customer' dropdown menu, a 'Customer Details' section with fields for 'Ref' (ALA08035), 'CA0001', 'Name' (ALAN MCGEE), and 'Customer Ref'. An 'Address' section contains fields for 'Street 1' (Ardee Business Park), 'Street 2', 'Town' (Ardee), 'County' (C.o Louth), and 'Post Code'. At the bottom right, there are 'Cancel' and 'Continue' buttons. At the bottom center, there are 'Save' and 'Close' buttons.

Customer on the Sales Order

Add a Part to a Sales Order

Click **Add Part** button to add a part onto the Sales Order. This is the same process whether you adding a part onto a newly created Sales Order or if you are adding a part onto a previously created Sales Order.



The 'Details for SOP Number : 000001909' window shows the 'Sales Order Header' section with the same customer and address details as the previous window. The 'Activity' section shows 'Add Part' highlighted with a red box. Below the header, there is a 'Details' section with tabs for 'Parts', 'Notes', and 'Credit Limits'. The 'Parts' tab is active, showing a table with columns: Part No, Description, Retail Price, Qty, Retail Sale, % Dis..., Nett Sale, and VAT. The table is currently empty. At the bottom right, there are 'Save' and 'Close' buttons.

Add Part

Type in part or the entire *Part No.* or part or the entire *Description* into the relevant text box and click **Enter**.

The *Parts List* grid will display a list of parts that are matching your search criteria. The more refined your search criteria, the more accurate your search results will be.

If you want to carry out the search again, click **Cancel** and you will be returned to the empty text boxes allowing you to search again.

Click **Close** if you want to return to the previous screen without adding a part to the Sales Order.

Once you have found the item that you want to add to the Sales Order, click on it to highlight it and click **Use**.

The screenshot shows a software window titled "SOP - Add Product". Inside, there's a section "Parts for SOP No : 1909". It contains two text input fields: "Part No" with the value "giz" and "Description" which is empty. To the right, there's a "Stock Supply Depot" dropdown menu showing "ASC Software (Ardee)". Below these is a "Parts List" table with the following data:

Part No	Description	Location	Min	Free
GIZ001	Gizmo	4505	10	93.00
GIZM01	New Gizmo	4505	1	0.00
GIZM02	Another Gizmo	4505	1	0.00
GIZM099	GIZM099	4310	0	0.00
GIZZER	GIZZER	4307	0	0.00
NEWGIZMO	Gizmo01	A.01	1	0.00

At the bottom of the window are three buttons: "Use", "Cancel", and "Close".

Select a Part

The next screen will allow you to add the details in for that Part.

SOP - Add Product

Parts for SOP No : 1909

Part No: GIZ001

Description: Gizmo

Stock Supply Depot: ASC Software (Ardee)

Bin Stock: 93.00

Location: 10

Qty Required: 2

☐ Serial Number Required

Valuation Price: 100.00

% Mark Up: 6.7599 %

% Discount: 25.00 %

Selling Price: 143.00

Total Sale: 214.5000

☒ Selling Price Is Preset

Save Close

Close

Add Details

You must fill in the **Qty Required**.

Selling Price field can be altered.

If **Selling Price is Preset** is ticked, then **% Markup** will not be activated and you cannot enter a new Markup Percentage. However, if this box is not ticked, you cannot enter any value into the **% Markup** field.

Click **Save** to exit this screen and to save the details on the Sales Order.

Click **Close** to exit without saving the information you have filled in and to allow you to carry out another search.

You can now enter a search for another part or else you can click **Close** to exit to the main SOP screen.

Click **Save** to save the Sales Order.